FINAL DRAFT
Contract #
SFA Training Contract

Task Order #
Name

Continuous communication between all parties is a requirement of this statement of work. The contractor shall include a detailed quality assurance plan with their proposal, stating how continuous communication will take place throughout the performance period of this project.

Introduction (e.g.)

The purpose of this task order is to provide assistance to the U.S. Department of Education, Office of Student Financial Assistance, Student Financial Assistance University (SFAU), in conducting training on the… This training will take place at… SFAU will offer up to (#) workshops… The period of performance for this task order is from (DATE) through (DATE).

The target audiences for these workshops are……

Overview (e.g.)

The contractor shall: 1) attend up to a two-day planning kick off meeting, 2) prepare management and instructional design plans, 3) develop participant workbooks and Instructor Notes, 4) develop and maintain a website for trainers, 5) develop training exercises and databases for trainers, 6) secure training sites, 7) conduct up to two dry runs, 8) secure up to five school partners to participate in the dry run, 9) facilitate up to two Training of Trainers (TOT), 10) provide up to seven updates of the: Instructors Notes, Participants Workbook, databases, 11) prepare a final report and attend a close out meeting.

Tasks (e.g.)

Kick Off Meeting - Prior to the beginning of work, the contractor shall meet with the COTR and SFAU Development Team for a kick off meeting. The meeting may last up to two days for each training module. During this meeting the COTR, Contractor (including the Project Lead and two training developers) and the SFA Development Team will work on rough drafts of the Management Plan, Instructional Design Plan and the Training Site Requirements Checklist. The meeting will discuss training procedures and content, including the latest updates in software, policies and procedures that will be the basis of the training design and methodologies.

Management Plans – The contractor shall submit first and final drafts of management plans for this training. The management plans shall: 1) incorporate the discussions held during the kick off meeting, 2) include a synopsis and objectives of the activity, and 3) include a schedule of activities and deliverables. Any SFAU comments and changes to first drafts of the management plans shall be included into the final draft.

Instructional Design Plans – The contractor shall submit first and final drafts of instructional design plans that incorporate the discussions held during the kick off meeting. Both drafts shall contain an overview of the training design, a detailed curriculum outline, proposed format and content layout of the training materials, and sample pages of the materials. The contractor shall propose instructional design plans that include a high degree of trainee participation using guided discussion, group exercise, etc. At SFAU's

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request, the contractor shall expand the curriculum outlines to integrate relevant policy and software changes. The contractor shall discuss the requested database in the instructor design plan. Any SFAU comments and changes to first drafts of the instructional design plan shall be incorporated into the final draft.

Materials – The contractor shall develop up to three drafts of the Participant Workbook, Instructor's Notes and PowerPoint slides. Each draft shall be posted to the training website and two hard copies delivered to the COTR. The contractor shall provide up to seven updates for the Participant Workbook and Instructor's Notes in a PDF file to be posted on the trainer's website. The contractor shall provide, up to thirty-five CD-ROM's that include the camera ready Participant Workbooks, Instructor's Notes, PowerPoint Slides and the database.

The Participant Workbooks shall include: (example)

- ♦ A table of contents
- ♦ Pages shall include a small caption of the PowerPoint Slide, instructional text, and space for participants to write notes
- ♦ Clearly defined learning objectives and sources for further study
- ♦ Acronyms, Glossary and Definitions at the beginning of each chapter
- ♦ Highlighted areas for new software or policy and software tips
- ♦ Written text shall include relevant information for all types of postsecondary institutions (credit hour, clock hour, etc.)
- ♦ Short summaries at the end of each chapter
- ♦ "Test your knowledge" exercises at the end of each chapter with the answers at the end of the workbook
- ♦ A general glossary at the end of the workbook
- ♦ Exercises, charts, graphs, and other illustrations must match the database and PowerPoint Slides

The Instructor's Notes shall include: (example)

- ♦ A bullet checklist of the participant's workbook that include regulations, software tips, and participant workbook page number references. The Instructor's Notes shall be prepared in a single sided page format, to be inserted into the Participants Workbook. The Instructors Notes shall include a detailed section of step-by-step instructions for loading the database, import files, and PowerPoint slides.

PowerPoint Slides shall include: (example)

- ♦ Slides shall correspond (match) with the Participant Workbook, exercises and training database. The slides shall be comprehensive and include all training points.

Exercises, Databases and Websites

The contractor shall provide a list of users and passwords to SFAU and include such information within the instructor's notes.

The contractor shall be responsible for upgrading the database for all versions of the software throughout the software cycle. It is understood that neither the contractor nor SFAU can determine the number of database upgrades that may be required at this time.

Comprehensive instructions for loading the database, which will be included as part of the Instructor's Notes, will also be posted to the Training Internet site for download.

Secure Training Sites

- Number of sites
- Number of classes
- Number of people per class
- Type of training room (computers, etc)
- Equipment needed (audio visual equipment - microphones, LCD projector and screen)
- Comprehensive loading instructions for Software courses

Dry Runs – The purpose of the dry run is to ensure that the materials are correct, and that simulations, exercises and databases work as intended and are not corrupted.

Training of Trainers - The purpose of the training of trainers (TOT) is to prepare the instructors to deliver the training. The contractor may be tasked to facilitate the TOT.

Reports: The contractor shall submit detailed progress reports on a monthly basis.

Technical Requirements: Training materials delivered to SFAU shall be coded in an open format, without any password or encrypted keys, or bars/prohibitions to duplication/copy capability

Optional Tasks (examples)

Reproduction and Mailing of Training Materials: If required, the contractor shall reproduce and ship Participants' Guides to workshops specified by SFAU. These materials shall be comparable to print quality and packaged securely.

On-Line Tutorials for Novice Users

Deliverables (examples)

	Deliverable	Date
1	Attend Kick Off Meeting	
2	Submit first draft of the Management Plan	
3	Submit first draft of the Instructional Design plan	
4	Submit list of recommendations for school sites	
5	Submit final list of training sites and contact information	
6	Submit & Post first drafts of Participant Workbook and Instructors Notes	
7	Develop and maintain a website for trainers-provide the COTR with the website address	
8	Submit & Post second drafts of Participant Workbook and Instructors Notes	
9	Submit a list of school partners to participate in the dry run	
10	Conduct a Dry Run on Materials	
11	Submit an error free camera-ready copy of Participant Workbooks, Instructors Notes and CD-ROMS of PowerPoint Slides to the COTR. The camera ready shall include ALL software and policy changes submitted from the 1st and 2nd draft by the COTR.	
12	Post Participant's Workbooks, Instructors Notes and Exercises 3 days prior to the TOT	
13	Conduct a Training of Trainers	
14	Submit Monthly Progress Reports	
15	Submit a final Report	

Optional Deliverables (examples)

1	Reproduce and Mail Participant's Guides to specified training sessions	
2	On-Line Tutorials for	

Performance Incentives (examples)

Example Incentive #1

If the contractor's execution of deliverable #11 is timely and satisfactorily accepted by SFAU, then SFAU will pay the contractor an additional three percent (3%) of the total labor rate for the development of this project (excluding the task of optional deliverables). If there are any delays incurred in the development of this deliverable that are on the behalf of SFAU then the deliverable date for number 11, will be adjusted accordingly. If the deliverable is delayed on behalf of the contractor then this performance incentive is null and void.

Performance measure: The performance will be measured by comparing the submitted camera-ready copy to the 1st and 2nd drafts of comments submitted by the COTR to the contractor.

Example Incentive #2

It is imperative to our trainers that the site requirements, deliverable # 5 are satisfactorily met for this project. The Training Site Requirements Checklist will be developed during the Kick-Off meeting, along with a draft evaluation form for each training site. After SFAU and the contractor agree on the evaluation form, the trainers will complete the form at the end of each training session and submit the form via the contractor's Internet site.

Performance measure: If one-hundred percent (100%) of the training sites that the contractor secured meet all of the checklist requirements then SFAU will pay the contractor an additional three percent (3%) of the total labor rate for the development of this project (excluding optional deliverables). If 90% of the training sites that the contractor secured meet all of the checklist requirements then SFAU will pay the contractor an additional one percent (1%) of the total labor rate for the development of this project (excluding optional deliverables).